SHEF Past Meeting Topics

Meeting agendas are developed with input from our members. We call on "subject experts" from medical and caregiving professions, public policy and financial services to facilitate our sessions. The roundtable discussion format facilitates an exchange of the broad range of perspectives that different industries bring to the shared challenges of senior health & care funding.

Meeting #1 – April, 2017

Washington Update
James Capretta, Fellow, American Enterprise Institute

The Future Direction of Healthcare
Ralph Muller, CEO, University of Pennsylvania Health System

Senior Healthcare Cost Drivers
- Michael Buckley, MD, Retired CEO of Pennsylvania Hospital, Chief Medical Officer and Associate Dean for Physician Networks
- Nisha Rughwani, MD, Geriatric Physician and Associate Professor, Icahn School of Medicine, Mt. Sinai Hospital, NY
- Robert Kleman, VP Payor Strategies, Main Line Health System
- Brian Duke, MBE, MBA, Dr. of Senior Services, Main Line Health System; former Secretary of Department of Aging, State of PA
- Mindy Ferris, R.Ph., COO of Partners Pharmacy (the third largest long term care pharmacy in the US)

Survey: Perspectives on Healthcare Funding

Meeting #2 – October 2017

Understanding and Managing the Financial and Emotional Impact of Alzheimer's
Beth Kallmyer, Vice President, Alzheimer's Association

Managing Post-Acute Care Expenses
Sanjoy Musunuri, Chairman and CEO, sinq Technologies

Aging at Home – The Direction of Services and Costs
- Brian Duke, Director of Sr. Services, MLHS; former Secretary of PA Dept. of Aging
- Sara Bradley, MD, Associate Professor of Medicine and Geriatrician, Northwestern Medical Center
- Marlene Lund, Senior Healthcare Advocate
- Annie Seltzer, Social Worker, Northwestern Medical Center Outpatient Geriatrics
- Louise Starmann, LCSW, Managing Partner, Senior Life Consulting, LLC

Trends in Concierge Medicine
Bob Grieb, DSG

The Direction of Health Savings Accounts (HSAs)
Heywood Sloane, DSG for Danny Humphrey, VP HSA Wellth Services, HealthEquity

Changing Consumer and Advisor Perspectives Regarding Long Term Care
Bruce Moon, OneAmerica and Steve Schoonveld, Lincoln Financial

Future Innovations in Long Term Care Insurance
Rebecca Tipton and Matt Winegar, Thrivent Financial

Survey: Senior Healthcare Funding Segmentation

Meeting #3 – April, 2018

Population Health – Its Impact on Healthcare Delivery and Costs
David B. Nash, MD, MBA, Dean of Thomas Jefferson University College of Population Health

Understanding the Range, Access and Benefits of HHS Programs
- Dalton Paxman, HHS Regional Administrator
- Sarah Shrimplin Yacoub, HHS Public Health Advisor

The Direction of Employment Based Health Benefits
Paul Fronstin, Ph.D., Director of Health Research & Education at the Employee Benefit Research Institute (EBRI)

Integrating Healthcare Funding on an Institutional Basis
Becky Nilsen, former CEO of Desert Schools Financial Services

Financial Advisor's Successful Approach to Helping Families Dealing with Dementia
Andy Hunt, Financial Advisor, Edward Jones

Planning for Senior Healthcare Funding – Two Personal Case Studies (one positive, one negative)
Amy Mathis, Financial Services Executive and primary Care Coordinator for her family

Survey: Senior Healthcare Planning and Funding

Meeting #4 – October, 2018

Advocating For Critical Patients
Bonnie Friedman, Author, Hospital Warrior

Original Medicare vs Medicare Advantage – Differences and Direction
Joel Shalowitz, MD, MBA, FACP, Kellogg School of Business, Northwestern Univ. School of Medicine

Helping Consumers Make the Right Decisions Around Different Medicare Options
Craig Ritter, CEO, Ritter Insurance Marketing

How Home Health Care Providers Work
- Stephen Huber, President, Home Care Providers, Orange Co., CA
- Zac Overbey, CFO, Where the Heart Is, Memphis, TN

Senior Investor Regulatory and Compliance Issues
Marina Baranovsky, Principal, Scitus Consulting (former SEC Senior Risk Analyst)

Case Study: Integrating HSAs into Advisors' Practices
Laura Grogan-O'Mara, Bank of America, Merrill Lynch

Successful Long Term Care Insurance Sales
- Marlene Lund, Lund Insurance, Speaking of Aging
- Andrew Levy, Lincoln Financial
- Heather Olson, OneAmerica

Survey: "Pop Up Survey" series covering various topics including Cost Drivers, Understanding Government Programs, Understanding HSAs, Employer Efforts

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